

Article Name: Keying Roadside Reimbursement for Customer

Issue: Reimbursement for Roadside Service

Resolution:

1. Refer to [SOP: Claim Number Search in CMS](#)
2. From the Claim page, click the **Estimate** tab.
3. In the Estimate screen, click the **Lock** icon to lock the claim.
 - a. Once locked it will show username that has the claim locked with a timer, and the **Unlock** icon will highlight.
4. Once locked, click the **Add Claim Item** button.

Result: Estimate Screen will open.
5. Fill in 'Estimate'
 - a. 'Coverage Group' select **[Road Service]**
 - b. 'Coverage Item' select which ever category best fits the service.
6. When selecting 'Road Service', Estimate will change to 'Service', Continue Estimate.
 - a. 'Payable Type' select **[Service Contract]**
 - b. 'Payee Type' select **[Customer]**
 - c. 'Quantity' enter 1.
 - d. 'Vendor Rate' enter the rate from service invoice.
 - e. 'AAS Rate' enter contract benefit maximum.
 - f. 'Authorized Rate' enter the lesser amount between 'AAS Rate' or 'Vendor Rate'
7. Click **[Save]**
 - a. Confirm entry by Clicking [Unauthorized] hyperlink, service should be visible.
8. Unlock claim by clicking **[Unlock]** button.
9. Message your Team Lead in Teams for claim to be 'Authorized' and task to Lead refer to SOP: Assigning a Task - CMS
10. Notate Claim refer to SOP: Inputting Notes into CMS

Related Resources and Documents:

[SOP: Claim Number Search in CMS](#)

[SOP: Assigning a Task - CMS](#)

[SOP: Inputting Notes into CMS](#)

Purpose

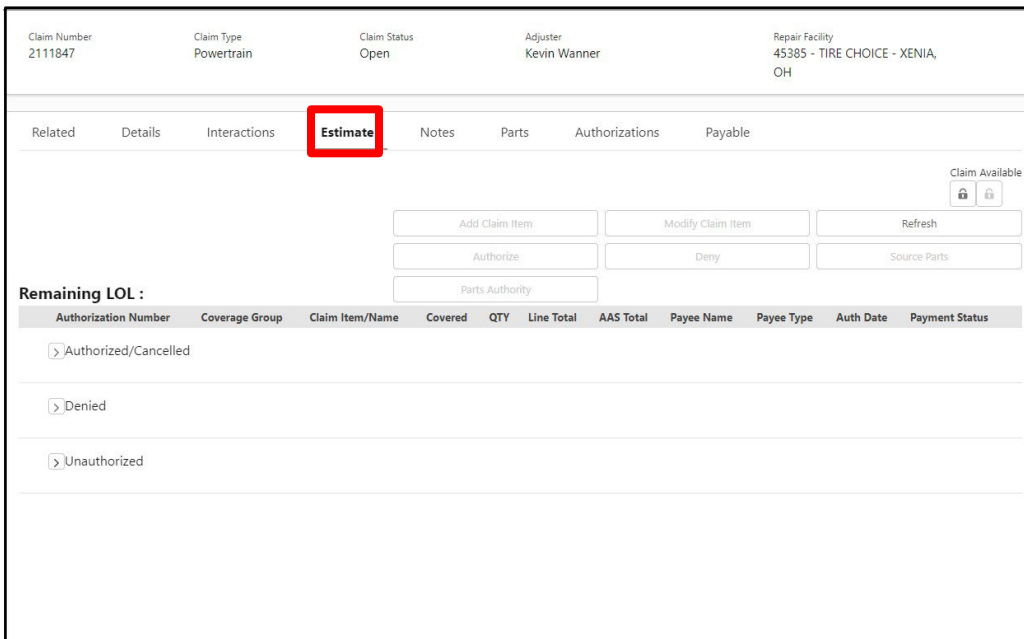
This SOP is intended to outline how to key in roadside reimbursement.

Teams Impacted

- Claims
- Customer Service



Procedure

1. Refer to SOP: Claims Search in the Customer Service Knowledge Base.
2. You will land on the Claim page.
 - a. Click on the **Estimate Tab**.



Claim Number: 2111847 | Claim Type: Powertrain | Claim Status: Open | Adjuster: Kevin Wanner | Repair Facility: 45385 - TIRE CHOICE - XENIA, OH

Related | Details | Interactions | **Estimate** | Notes | Parts | Authorizations | Payable

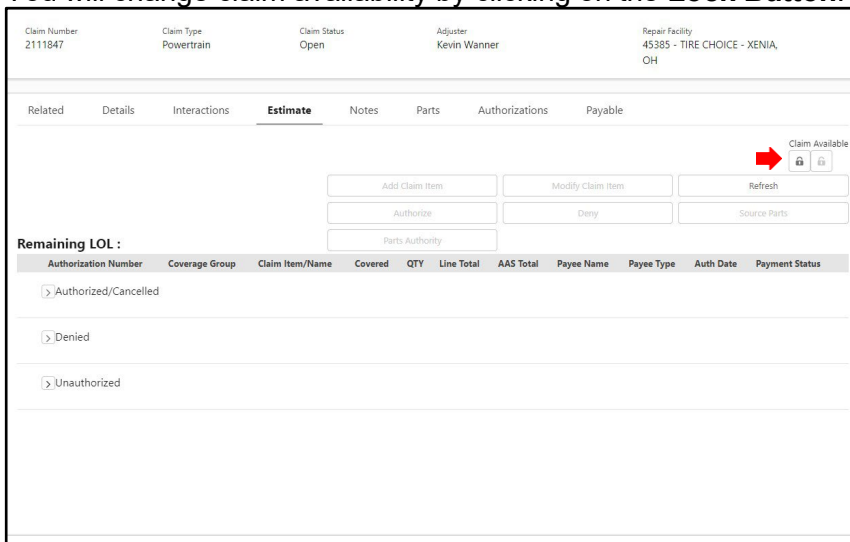
Claim Available:  

Buttons: Add Claim Item, Modify Claim Item, Refresh, Authorize, Deny, Source Parts, Parts Authority

Remaining LOL :



Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
Authorized/Cancelled										
Denied										
Unauthorized										

- b. You will change claim availability by clicking on the **Lock Button**.



Claim Number: 2111847 | Claim Type: Powertrain | Claim Status: Open | Adjuster: Kevin Wanner | Repair Facility: 45385 - TIRE CHOICE - XENIA, OH

Related | Details | Interactions | **Estimate** | Notes | Parts | Authorizations | Payable

Claim Available:   (Red arrow points to the Lock icon)

Buttons: Add Claim Item, Modify Claim Item, Refresh, Authorize, Deny, Source Parts, Parts Authority

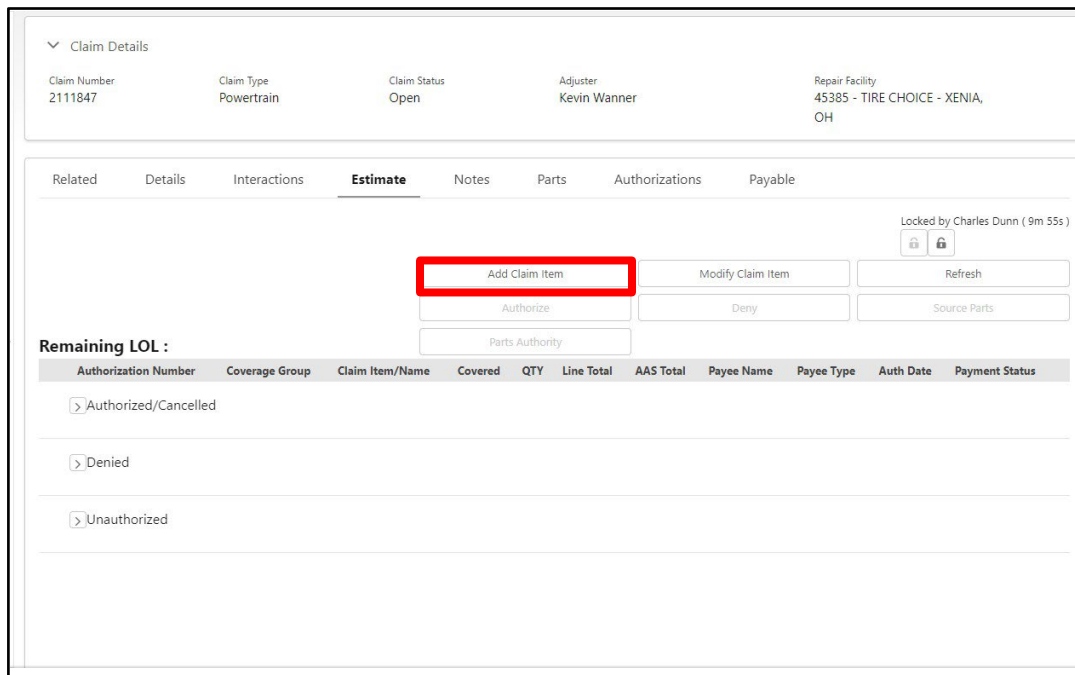
Remaining LOL :

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
Authorized/Cancelled										
Denied										
Unauthorized										

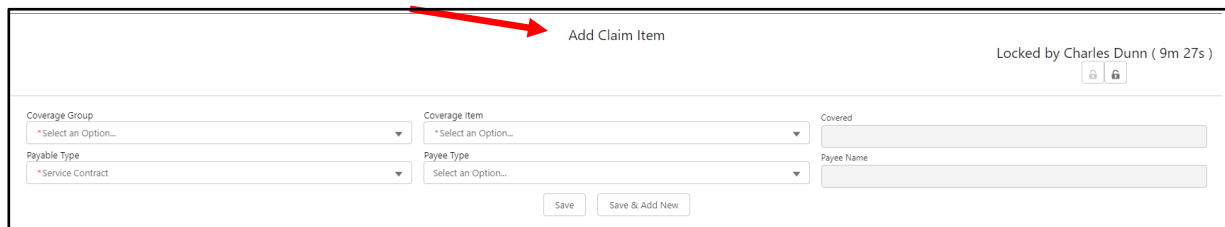
Note: You will see a timer shown above the “lock and unlock” please refer to the example photo below.



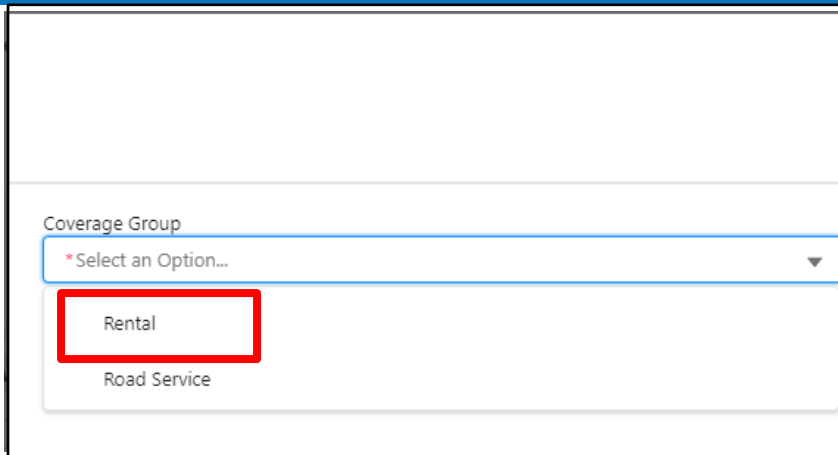
c. After making sure you have locked the claim click on **add claim item**.



3. You will land on the add claim item screen.



a. Select **Road Service** under the coverage group dropdown menu.



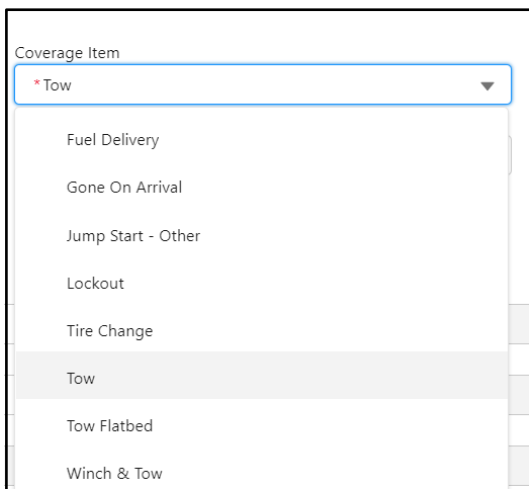
Coverage Group

* Select an Option...

Rental

Road Service

- b. Under **“Coverage Item”** select the option that best fits the road service being reimbursed.



Coverage Item

* Tow

Fuel Delivery

Gone On Arrival

Jump Start - Other

Lockout

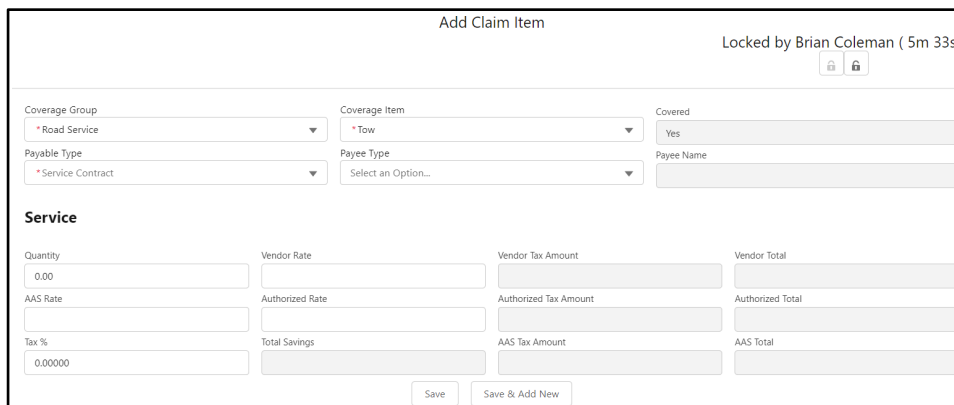
Tire Change

Tow

Tow Flatbed

Winch & Tow

Note: You will then see additional requirements added to be filled in on the add claim item screen, please refer to the example photo below.



Add Claim Item

Locked by Brian Coleman (5m 33s)

Coverage Group: * Road Service

Coverage Item: * Tow

Covered: Yes

Payable Type: * Service Contract

Payee Type: Select an Option...

Payee Name:

Service

Quantity	Vendor Rate	Vendor Tax Amount	Vendor Total
0.00			
AAS Rate	Authorized Rate	Authorized Tax Amount	Authorized Total
Tax %	Total Savings	AAS Tax Amount	AAS Total
0.00000			

Save Save & Add New

- c. Select **Service Contract** under payable type dropdown menu.

Payable Type

* Service Contract ▼

Service Contract

Goodwill (GW)

Legal (LG)

Recovery

Credit - Unused Funds

Override

Repair Sentry

Loss Adjusting Expense

d. Select **"Customer"** under payee type drop down menu.

Payee Type

Select an Option... ▼

Repair Facility

Customer

Seller

Supplier

Rental

Other

Reminder!

- Please refer to the Additional Benefits section on the contract to verify what roadside benefits the contract provides.

e. Under **Quantity** type in 1.

Service

Quantity 1.00

Vendor Rate 125.00

Vendor Tax Amount 0.00

Vendor Total 125.00

AAS Rate 75.00

Authorized Rate 75.00

Authorized Tax Amount 0.00

Authorized Total 75.00

Tax % 0.00000

Total Savings 50.00

AAS Tax Amount 0.0

AAS Total 75.00

Save Save & Add New

f. Under **Vendor Rate** type in the amount that the road service provider is charged for the service.

Service

Quantity	Vendor Rate	Vendor Tax Amount
1.00	125.00	0.00
AAS Rate	Authorized Rate	Authorized Tax Amount
75.00	75.00	0.00
Tax %	Total Savings	AAS Tax Amount
0.00000	50.00	0.0

Save
Save & Add New

- g. Under **AAS Rate** type in the maximum amount that the contract roadside benefit allows per occurrence.

Service

Quantity	Vendor Rate	Vendor Tax Amount
1.00	125.00	0.00
AAS Rate	Authorized Rate	Authorized Tax Amount
75.00	75.00	0.00
Tax %	Total Savings	AAS Tax Amount
0.00000	50.00	0.0

Save
Save & Add New

- h. Under **Authorized Rate** type in the amount that AAS is authorizing.

Service


Quantity	Vendor Rate	Vendor Tax Amount
1.00	125.00	0.00
AAS Rate	Authorized Rate	Authorized Tax Amount
75.00	75.00	0.00
Tax %	Total Savings	AAS Tax Amount
0.00000	50.00	0.0

Save
Save & Add New

4. Click **Save**.

Service

Quantity	Vendor Rate	Vendor Tax Amount
1.00	125.00	0.00
AAS Rate	Authorized Rate	Authorized Tax Amount
75.00	75.00	0.00
Tax %	Total Savings	AAS Tax Amount
0.00000	50.00	0.0



Save

Save & Add New

5. You will land back on the **Estimate Tab** page.

Claim Details

Claim Number

2112062

Claim Type

General

Claim Status

Open

Adjuster

Matthew Northcutt

Repair Facility

66441 VALOR AUTOMOTIVE

Related

Details

Interactions

Estimate

Notes

Parts

Authorizations

Payable

Locked by Charles Dunn (4m 0s)

Add Claim Item

Modify Claim Item

Refresh

Authorize

Deny

Source Parts

Parts Authority

Remaining LOL : \$9,410.00

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Type	Auth Date	Payment Status
>	Authorized/Cancelled									
>	Denied									
>	Unauthorized									

- a. Check that road service was keyed in by clicking the drop-down arrow next to **Unauthorized**.

Related Details Interactions **Estimate** Notes Parts Authorizations Payable

Locked by Brian Coleman (9m 10s)

Add Claim Item Modify Claim Item Refresh

Authorize Deny Source P

Parts Authority

Remaining LOL : \$9,437.58

Authorization Number	Coverage Group	Claim Item/Name	Covered	QTY	Line Total	AAS Total	Payee Name	Payee Typ
> Authorized/Cancelled								
> Denied								
> Unauthorized								
<input type="checkbox"/>		Road Service Tow	Yes	1	\$75.00	\$75.00	JASMINE MURPHY	Customer
		Sub Total			\$75.00	\$75.00		

6. Unlock the claim by clicking the **Unlock Button**.

Locked by Charles Dunn (2m 20s)

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7. Customer service agents will need to task a Team Lead to authorize the reimbursement. Refer to SOP: Assigning A Task in the Customer Service Knowledge Base.
8. Refer to SOP "Notating in CMS" in the Customer Service Knowledge Base.



SOP: Keying Roadside Reimbursement

Approval & Revision

Date Created 12/02/2022	Created By Charles Dunn		Date Approved 12/4/2022	Approved By Brian Coleman
Date Revised 1/16/2023	Revised by Felicia Mainiero	Revision Description Step 1 stating we needed a rental receipt and formatting was not correct.	Date Approved 1/16/2023	Approved By Felicia Mainiero
Date Revised 08/01/2023	Revised by Melissa Bryant	Revision Description Added Fast Track Article	Date Approved 08/01/2023	Approved By Amanda Wiseman
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]